



09 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,605	0.0 %	(0.6) %
BSE SENSEX	38,701	(0.4) %	(0.4) %
CNX BANK	29,845	0.0 %	(1.6) %
CNX MIDCAP	18,102	0.0 %	(1.3) %
CNX SMALLCAP	6,650	0.0 %	(1.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,341	(0.3) %	12.9 %
S&P 500	2,896	0.1 %	15.5 %
FTSE 100	7,452	0.1 %	10.7 %
HANG SENG	30,077	0.5 %	19.7 %
NIKKEI	21,762	(0.2) %	11.2 %
SHANGHAI COMPOSITE	3,245	(0.1) %	31.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.55	1.3 %	0.2 %
EUR/USD	1.12	0.1 %	(1.8) %
GBP/USD	1.31	(0.8) %	2.4 %
USD/JPY	111.46	(0.0) %	1.7 %
USD/AUD	1.41	0.0 %	(1.0) %
USD/SGD	1.36	0.1 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	2.1 %	38.4 %
Gold(INR/10g)	31,930	1.0 %	1.3 %
Gold Comex(USD/oz)	1,297	0.5 %	0.5 %
SILVER(INR/1Kg)	37,650	0.2 %	(1.6) %
Aluminium(USD/MT)	1,859	(0.3) %	0.0 %
Copper(USD/MT)	6,433	0.2 %	10.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.0 %	(0.1) %

Global Economy: New orders for US manufactured goods fell by slightly less than expected in the month of February, according to a report released by the Commerce Department on Monday. The report said factory orders dropped by 0.5% in February after coming in virtually unchanged in January. Eurozone investor confidence strengthened for a second straight month to its highest level in four months, while morale weakened sharply in Germany to its lowest level since 2012, survey data from the behavioural finance research group Sentix showed. The Sentix investor confidence index for the euro area climbed to -0.3 from -2.2 in March. Germany's exports fell a calendar and seasonally-adjusted 1.3 percent month-on-month, preliminary figures from the Federal Statistical Office showed on Monday, as demand ebbed amid the global uncertainties, adding to concerns sparked by recent data that growth in the biggest economy in the euro area remained sluggish in the first quarter. The decline was the first in three months and the biggest since February 2018.

Global Equities: Global equities paused after recent gains as traders eyed a critical Brexit summit this week.

Indian Economy: Domestic passenger vehicle sales rose by 2.7% to 33,77,436 units in FY2018-19, compared to 32,88,581 units in 2017-18. Domestic passenger vehicle (PV) sales declined by around 3% to 2,91,806 units in March 2019 from 3,00,722 units in the year-ago month. Domestic car sales dropped by 6.87% to 1,77,949 units during the month as compared to 1,91,082 in March 2018, according to data released by the Society of Indian Automobile Manufacturers (SIAM).

Equity Markets: Key equity indices settled with modest losses after a volatile session as investors shifted their focus to Q4 March 2019 corporate earnings starting this week. The Sensex fell 161.70 points or 0.42% to settle at 38,700.53. The Nifty 50 index fell 61.45 points or 0.53% to settle at 11,604.50.

Corporate News: Voltas and Shima Seiki Mfg. (Shima), a leading Japanese textile machines manufacturer, have entered into a distribution agreement for sales and marketing of Shima's products in India. Sun Pharmaceutical Industries (Sun Pharma) announced that its subsidiary, Sun Pharma Distributors (SPDL), will commence distribution of the company's formulation products in India from April 2019, on the same terms as was with Aditya Medisales, in a phased manner upon receipt of requisite regulatory approvals. This phased transition is expected to be fully completed by the first quarter of financial year ending March 2020. DLF will be watched. Government of Singapore (GIC) sold 6.79 crore shares, or 3.81% stake, in DLF at Rs 191.01 each. As on 31 December 2018, GIC held 7.32 crore shares, or 4.105% stake in DLF. Societe General acquired 2.08 crore shares, or 1.17% stake in DLF.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	96.8	279.0	279.0
MF(INR cr)	(416.0)	(194.6)	(194.6)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,365	37,783	37,783
F&O(INR cr)	796,824	1,006,709	1,006,709

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.2	13.3	13.3
NSE VIX	20.2	18.7	18.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,845	(0.8) %	(1.6) %	Energy	15,983	(1.2) %	(3.3) %
IT	16,028	0.7 %	1.2 %	Pharma	9,244	(0.3) %	(1.4) %
Metals	3,102	(1.0) %	(0.0) %	Finance	12,504	(0.7) %	0.0 %
Auto	8,526	(0.4) %	1.3 %	PSU	3,259	(1.1) %	(3.7) %
FMCG	29,804	(0.2) %	(1.3) %	Real Estate	270	(2.2) %	1.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	17	6.1 %	(2.5) %	DLF	185	(8.4) %	(5.6) %
Avenue Sup	1,482	2.2 %	(0.7) %	Indiabulls	859	(4.8) %	1.4 %
New India	190	2.0 %	0.8 %	H P C L	253	(4.2) %	(10.9) %
Shriram Tr	1,242	1.5 %	0.5 %	I O C L	152	(4.0) %	(4.2) %
A B B	1,396	1.3 %	5.9 %	Bajaj Fin.	3,024	(2.9) %	0.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (FEB)	09-04-2019	01:30	AUD	-	-
Investment Lending (FEB)	09-04-2019	01:30	AUD	-	-
Owner-Occupier Loan Value (MoM) (FEB)	09-04-2019	01:30	AUD	-	-
Unemployment Rate (MAR)	09-04-2019	05:45	CHF	-	-
Unemployment Rate s.a. (MAR)	09-04-2019	05:45	CHF	-	-
Bank Lending Ex-Trusts (YoY) (MAR)	09-04-2019	23:50	JPY	-	-
Bank Lending incl Trusts (YoY) (MAR)	09-04-2019	23:50	JPY	-	-
Domestic Corporate Goods Price Index (MoM) (MAR)	09-04-2019	23:50	JPY	-	-
Domestic Corporate Goods Price Index (YoY) (MAR)	09-04-2019	23:50	JPY	-	-
Machine Orders (MoM) (FEB)	09-04-2019	23:50	JPY	-	-
Machine Orders (YoY) (FEB)	09-04-2019	23:50	JPY	-	-
Bi-Weekly Core CPI (MAR 31)	09-04-2019	13:00	MXN	-	-
Bi-Weekly CPI (MAR 31)	09-04-2019	13:00	MXN	-	-
Bi-Weekly CPI (YoY) (MAR 31)	09-04-2019	13:00	MXN	-	-
CPI (MoM) (MAR)	09-04-2019	13:00	MXN	-	-
CPI (YoY) (MAR)	09-04-2019	13:00	MXN	-	-
CPI Core (MoM) (MAR)	09-04-2019	13:00	MXN	-	-
NFIB Small Business Optimism (MAR)	09-04-2019	10:00	USD	-	-
JOLTS Job Openings (FEB)	09-04-2019	14:00	USD	-	-
U.S. to Sell USD38 Bln 3-Year Notes	09-04-2019	17:00	USD	-	-
Clarida Speaks at Fed Listens Event in Minneapolis	09-04-2019	22:45	USD	-	-

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